United States
Department of Agriculture

Foreign Agricultural Service

Foreign Agriculture

March 1983

The Down-Under Drought: Australia's Wheat Shortfall

Marketing News

A Sporting Chance for U.S. Floor Sales to The Far East

Representatives of the **Maple Flooring Manufacturers Association** recently returned from a trade mission to the Far East where they explored the market potential for U.S. maple flooring, primarily for sports facilities.

The association's vice-president reported that Japanese racquetball floor markets offer great potential for U.S. manufacturers. Another growth area in Japan is in portable basketball courts. To move in on this market, the association plans to put out promotional literature in Japanese, and some association members are considering forming an export trading company.

Feed Grains Council Helps Portugal's Industry Modernize

Portugal is one of the five largest markets for U.S. feed grains and has the highest per capita feed consumption in the world. But Portugal's plans to join the European Community (EC) could put a crimp on the pace of Portuguese imports. After it joins the EC, Portugal's private sector, rather than the government, will have to coordinate feed grain imports. In addition, the EC's stringent standards on feed quality control will force Portugal's feed industry into a fast and extensive modernization program.

The **U.S. Feed Grains Council** helped the Portuguese get a start on this modernization process by sponsoring a feed manufacturing symposium. More than 75 percent of Portugal's feed manufacturing industry attended the two-day seminar. That kind of success should keep Portugal a top importer of U.S. feed grain even in the face of new and changing conditions.

Canadians Enjoy California Wine

In Canada, the **Society for American Wines** recently held a wine tasting in Ottawa, Montreal, Toronto and Calgary of Louis M. Martini Cabernet Sauvignons. Louis P. Martini of the California winery presented a slide show on winemaking in California and then offered several of his Cabernets for tasting. Martini was particularly interested in this type of promotion since he recently appointed an importing agent in Quebec. The Society welcomes the opportunity to do more of these promotions for any American winery. All that is needed is a commitment from the winemaker to attend and the donation of the wine. For details, contact the Society for American Wines, P.O. Box 4901 Station E, Ottawa, Ontario K1S5J1, Canada, or the U.S. agricultural counselor's office in Ottawa (613) 238-5335.

Rendering Industry Sponsors Japanese Seminar

A representative of the U.S. rendering industry recently visited Japan to promote the increased use of edible tallow by Japan's fast food industry. K. Richard Ellis of Peterson Manufacturing conducted a seminar as part of the **National Renderers Association's** edible tallow program before the Hamburger Association and the Japan Fast Food Restaurants Association. Included in the program were taste tests for fast food representatives, including chefs and nutritionists. The test compared food fried in both vegetable oil and tallow-based shortening.

The market situation for tallow in Japan has not been favorable because of fluctuating exchange rates. However, with the recent growth in Japan's fast food industry, the use of edible tallow is expected to take off sharply.

The Magazine for Business Firms Selling U.S. Farm Products Overseas

Published by
U.S. Department of Agriculture
Foreign Agricultural Service

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Australian Crop Shortfall: Opportunities for U.S. Exports?

By Mary Ponomarenko

Australia is suffering from its worst drought in recent memory, and the country's grain exports are expected to plummet. As a result, other exporting countries are scrambling to pickup additional sales.

Australian wheat and barley output is down sharply, while prospects for the sorghum crop remain uncertain. The Australian shortfall, however, is not expected to have a significant impact on world grain markets.

Australia's wheat production is likely to fall almost 8 million metric tons below last season's output. Collectively, supplies in the United States, Canada, the European Community (EC) and Argentina are about 13 million tons above last year's level, and they more than offset Australia's severely reduced output.

Wheat Export Opportunities for the U.S.—and Others

Australia's wheat exports during its 1982/83 marketing year (Dec.-Nov.) are forecast at about 6 million tons. This will be less than half of the 1981/82 export level. The Australian five-year average world market share of about 12-13 percent is expected to fall to only 7.5 percent in 1982/83 (July-June).

This severe export reduction has opened market opportunities for the United States, Canada, France and Argentina. Record supplies outside of Australia have intensified competition for this additional business.

U.S. wheat exports for 1982/82 (July-June) are projected at 43.5 million tons, compared with 48.3 million the year earlier and 41.2 million in 1980/81.

The Canadians and the French have increased bilateral commitments and extended large amounts of credits this season to help bolster exports. In the case of France, credit has been offered at considerably below market rates.

The United States has begun a blended credit program to maintain competitiveness in world markets. Under the program, interest-free direct U.S. government credits are blended with government-guaranteed private credit to produce a lower interest rate.

Reportedly, Argentina may also be considering some type of export credit program.

It's still too early to say which exporters will gain the most from the drop in Australian wheat exports.

Additional Gains Likely For Barley Exporters

Over the past five years, Australia has sold an average of about 2 million tons of barley annually. But shipments during the Australian marketing year are forecast to fall to less than a half million tons.

The United States and Canada have already benefited from an apparent shift in Australia's barley exports away from the USSR, Japan and Taiwan towards Saudi Arabia.

The bulk of Australia's limited exportable supplies this season is expected to go to Saudi Arabia—Australia's largest barley market.

As a consequence, competition between the United States, Canada and the EC is likely to intensify for sales in the Saudi market. Additional barley sales this season are likely, but barley importers may switch some of their purchasing to other coarse grains as well. This may mean additional U.S. corn exports to Japan and Taiwan.

U.S. barley exports in 1981/82 (July-June) totaled 2.2 million tons, compared with 1.7 million tons the previous year. The outlook for the current season calls for exports of about 1.2 million tons.

The Australian Wheat Export Dilemma

As production plummets, Australia's export capability is reduced substantially. Smaller export supplies pose a

dilemma for Australian decision-makers—they must decide which markets will receive scaled-down exports.

Australia will have to sharply cut wheat exports to many markets. Australia has long-term bilateral agreements with China, Egypt, Iraq, Abu Dhabi, Qatar and the Yemen Arab Republic (Sanaa).

Under these agreements, Australia's wheat export commitments total just over 3 million tons. Currently no agreement exists with the Soviet Union, although reports indicate that an arrangement has been under consideration.

Egypt, China and the USSR are Australia's major wheat markets, and the largest cutbacks are expected in exports to these markets. Together, these three countries bought more than 6 million tons of Australian wheat in 1981/82 (Dec.-Nov.). But this season's shipments to these destinations may slip to between 3 million and 3.5 million tons.

Traditionally, Japan, Malaysia, Indonesia and Singapore have taken from 2 million to 2.5 million tons of Australian wheat each year. But exports to these buyers this season may be only about 1.5 million tons, with movement to the combined market of Malaysia, Indonesia and Singapore falling to 50 percent or less of the previous season's level.

The Middle East has been a growth market for Australian wheat. In recent years, the Australians have shipped about 2 million tons to Mideast markets, excluding Egypt. Iran and Iraq have been the biggest buyers.

Australia has aggressively pursued the expanding Mideast markets as evidenced by the recently renegotiated bilateral agreement with Iraq. Despite the short Australian crop, the commitment levels of the agreement were raised from 400,000-600,000 tons annually to 500,000-700,000 tons.

Movement of Australian wheat to the Middle East is not likely to be significantly reduced this season. Exports could total 1.5 million tons.

Australia as a Possible Grain Importer

Australia may have to turn to other exporters for grain this year in order to meet minimum export commitments and domestic requirements. Australia may import unprecedented quantities of rye, malting barley, wheat, corn and sorghum.

Australia amended its Wheat Board Marketing Act to permit wheat imports, if necessary. Recently the Grain Sorghum Marketing Board was given permission to buy up to 75,000 tons of corn or sorghum from the United States. If the Australian drought continues and the upcoming sorghum crop deteriorates, more coarse grain imports may follow.

Australian plant quarantine regulations, which would sharply raise the cost of imported grains, appear to be the major obstacle to grain importing.

The rules for wheat and feed grain imports require:

- Processing at port of entry;
- Transporting between ship and mill under quarantine supervision;
- Phytosanitary certification that shipments are completely free of weed seeds; and
- Sufficient processing of imported grain to ensure that no whole grains of any type remain.

Complying with these regulations would be expensive. In addition, Australia's processing capacity at major ports is only 33,000-35,000 tons each month. However, increasingly expensive domestic grain may make processed imported grain more attractive.

As of late December, Australia had purchased only small amounts of grains—9,500 tons of New Zealand corn and 8,000 tons of Canadian rye. New Zealand corn is not subject to the same strict quarantine regulations as other imported grain and there are no quarantine restrictions on rye imports.

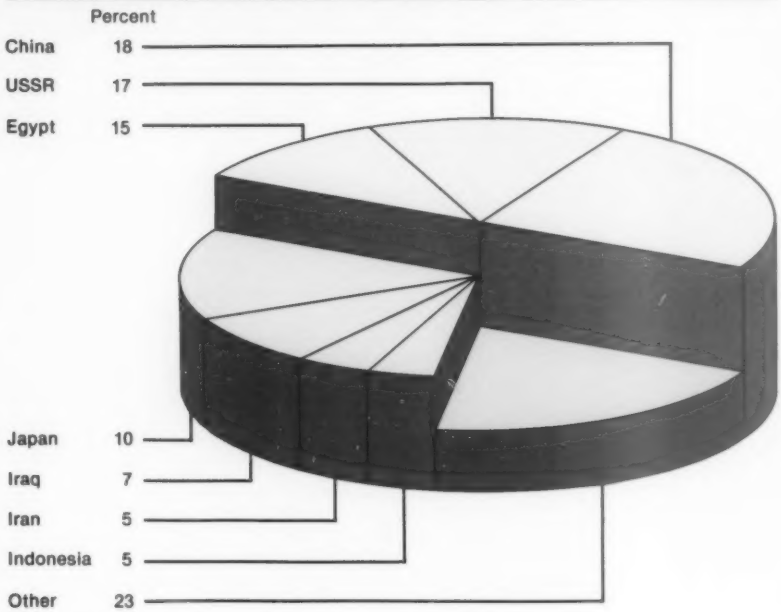
The latest Australian purchases of rye were larger than the amounts usually needed for human consumption. Australia's rye imports may increase further because of the shortage of malting barley and the potential use of rye for distilling purposes.

However, any large Australian purchases of grain on world markets will likely be North American grain. Additional exports of U.S. feed grains and Canadian wheat remain real possibilities. ■

The author is an agricultural economist with the Grain and Feed Division, FAS. Tel. (202) 447-5413.

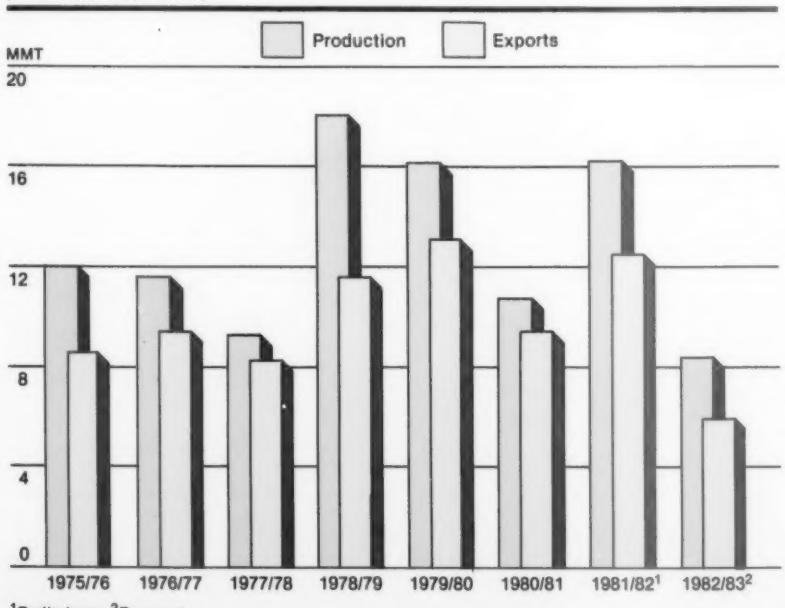
China, USSR and Egypt Top Buyers of Australian Wheat

(Percent of Australia's average wheat exports, 1978/79-1981/82, Dec.-Nov.)



The Ups and Downs of Australian Wheat

(Million metric tons, Dec.-Nov.)



[1]Preliminary. [2]Forecast.

Fact File

The Blended Credit Program

How the Program Works:

On Oct. 20, 1982, Secretary of Agriculture John Block announced a program to "blend" direct interest-free export credits, under the Commodity Credit Corporation's GSM-5 program with CCC export credit guarantees under the GSM-102 Export Credit Guarantee Program. The CCC guarantees are designed to provide interest rates below commercial levels to buyers of U.S. farm products. These blended credits are to be offered principally to developing countries, with terms of up to three years.

The first phase of the program included $100 million in direct credits and $400 million in credit guarantees. Within a month, foreign buyers had applied for the total allocation and, by December 17, all funds had been allocated. This cleared the way for private exporters to sell more than 2 million metric tons of wheat and significant amounts of corn, vegetable oil, soybean meal and cotton. The result was $500 million in additional U.S. export sales for an outlay of government funds of $100 million. The $100 million in direct credits is to be repaid in three years. With this outlay, U.S. agricultural exports are expected to rise by about $260 million. Also, farm jobs and farm income will be generated by the program.

On Jan. 11, 1983, an additional $250 million in direct interest-free credits and at least $1 billion in CCC export credit guarantees were announced by Secretary Block. Under this second phase of the program, countries have already made requests for blended credit to purchase U.S. dairy cattle, semen, tallow, seeds, shell eggs and other products as well as commodities sold under the first phase.

Recipient Countries:

Countries that had received blended credit allocations through mid-January included:

- Pakistan — vegetable oil, soybean meal ($5 million, direct credit; $20 million, credit guarantees).
- Morocco — 1.1 million tons of wheat ($28 million, direct credit; $112 million, credit guarantees).
- Egypt — 500,000 tons of wheat, 300,000 tons of corn and 50,000 tons of vegetable oil ($22 million, direct credit; $88 million, credit guarantees).
- Yugoslavia — 184,000 bales of cotton ($12 million, direct credit; $48 million, credit guarantees).
- Philippines—100,000 tons of wheat, 50,000 tons of corn and 50,000 tons of soybean meal ($8 million, direct credit; $32 million, credit guarantees).
- Brazil—375,000 tons of wheat ($12 million, direct credit; $48 million, credit guarantees).
- Portugal—13,000 bales of cotton ($1 million, direct credit; $4 million, credit guarantees).
- Yemen Arab Republic (Sanaa)—345,000 tons of wheat and 15,000 tons of rice ($12 million, direct credit; $48 million, credit guarantees).

Funding Sources:

The direct credit funding for the program comes from funds authorized recently by Congress to help increase exports. The Secretary of Agriculture is authorized to use the funds for interest buy-down, direct export credit sales or export subsidies so U.S. farmers may compete in international trade on an equal basis.

The program is designed to reduce the impact on U.S. government outlays over the next few years and is not intended to destabilize commodity markets. Because funding for the direct credit loans will be repaid, it is not a direct subsidy.

Requirements for Exporters:

Sellers of U.S. agricultural products under the blended credit program must first ship the GSM-102 (credit guarantee) portion of the contract to their overseas market before the CCC will provide funds for the GSM-5 (direct credit) portion. Before the CCC disburses GSM-5 funds to U.S. exporters, the exporter must certify that a quantity equal to four times the amount to be financed under GSM-5 has been exported under GSM-102.

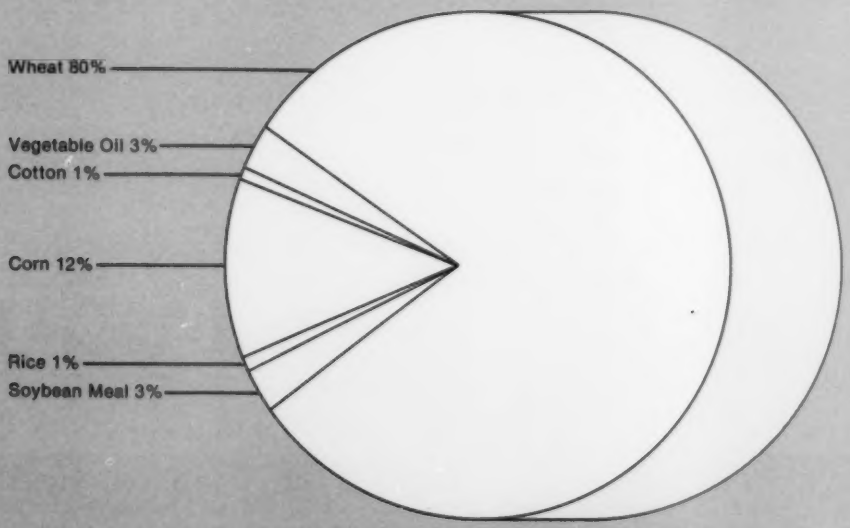
Although requirements of the blended credit program specify that purchases must follow this minimum 4:1 ratio of credit guarantees to direct credits, in some cases the ratio is even higher in favor of GSM-102.

To be eligible for GSM-102 guarantees, U.S. exporters must submit an application along with a guarantee fee to the CCC before export is completed. The guarantee fees include a charge for interest rate coverage of up to 8 percent yearly on the guaranteed value. Exporters may apply for a guaranteed value up to a maximum of 98 percent of the GSM-102 portion of the port value. Based on semi-annual repayments of principal, plus accrued interest, the fee rate per $100 is 15.6 cents for six months, 23.4 cents for one year, 39.3 cents for two years and 56.5 cents for three years. Based on equal annual repayments of principal, plus accrued interest, the fee rate per $100 is 32.9 cents for one year, 50.1 cents for two years and 69.2 cents for three years.

If the CCC determines that a payment is late, interest charges will be raised to the annual rate of interest in effect on the due date, plus 2 percent per year. This rate will be computed on the overdue amount beginning from the date of export through the due date. In addition, a penalty equal to the current CCC refinancing rate, adjusted annually, plus 5 percent per year, will accrue on the overdue amount. This will begin the day after the due date and accrue until the overdue amount is paid in full.

For more information about the program call: FAS Export Credits, Program Operations Division, (202) 447-3224.

Blended Credit Allocations by Commodity
(metric tons)



Brangus: The Making Of a Genetic Blend

By Tracy Holbert

Mix three parts Brahman cattle stock with five parts Angus stock and what do you have?

The answer is "Brangus"—a breed combining excellent mothering abilities and heavier, leaner carcasses, according to the International Brangus Breeders Association (IBBA) of San Antonio, Texas. Breeders around the world are using Brangus seed stock to improve their herds genetically.

The Brangus breed evolved after years of research and experimentation. In 1932, scientists concluded that a ratio of three-eighths Brahman, to five-eighths Angus provided the most complementary genetic blend.

Brangus cattle have the carcass quality and marbling of Angus, plus their adaptability to cold climates, fertility and outstanding mothering ability.

From the Brahman breed, Brangus inherit hardiness and a foraging ability that is unmatched, along with heat and insect tolerance, longevity, ease of calving and milking ability.

Foreign Market Development

Since 1975, the USDA's Foreign Agricultural Service (FAS) has had a cooperator agreement with the IBBA to develop foreign markets for Brangus. The biggest market for U.S. Brangus is Mexico.

In some countries, however, it is more feasible to use breeding techniques such as artificial insemination and embryo transfer to introduce the Brangus line.

Artificial insemination has long been used for producing superior beef cattle, but commercial embryo transfer is a relative newcomer to the industry.

The Granada Embryo Transfer Company of Marquez, Texas, made beef cattle history in 1981, when it was selected to help upgrade breeding stock in Egypt.

Granada, one of the largest embryo transfer companies in the United States and a pioneer in non-surgical transfer, flew 100 frozen Brangus embryos from Texas to Egypt for implantation. This was a first in terms of distance and quantity of frozen embryos.

In the beginning phase of the million dollar project, the 6- to 8-day-old embryos, removed non-surgically from superior Brangus cows, were frozen in liquid nitrogen. Following a trip of about 7,000 miles, the embryos were thawed and transferred non-surgically into Brown Swiss recipient "foster mothers."

The Brangus calves produced in Egypt by the successful embryo transfers will be used as foundation stock for a 150,000-acre reclamation project on the Nile Delta.

The Future of Brangus

First recognized as a breed in 1949, Brangus' popularity, reputation and demand have grown impressively, particularly since the mid-1970s. The future progress and profit of the beef industry hinges on the continued breeding of efficient ar imals such as the Brangus.

In an effort to help the cattle producer, the IBBA developed the Brangus Herd Improvement Records (BHIR), a computerized performance program.

The BHIR program can provide useful records, such as information on weights, and dam and sire summaries.

Current IBBA emphasis is on developing marketing channels in South Africa, Mexico and South America. Trips to these and other countries are planned to promote Brangus exports, including genetic material for artificial insemination.

The IBBA believes that Brangus cattle are in the prime position to move further ahead in producing seed stock. The future for Brangus looks promising. ■

The author is director of Field Service, International Brangus Breeders Association, San Antonio, Texas. Tel. (512) 696-8231.

Beefmaster—The Raiser's Edge

A vaquero (cowboy) near Tegucigalpa, Honduras, rounds up cattle selected for artificial insemination.

By Ruth Schumacher

How times have changed. In 1972, you could have picked up this high-performance model right off the "assembly line," leather upholstery and all, for a mere $696. A decade later, the price had shot up to $3,035—but still not a bad deal when you consider that all options come standard—hardiness, conformation, disposition, weight, milk production and fertility.

Milk production? Fertility?

Of course. A perfectly natural list of features for one of the most respected lines of purebred cattle in the world, the Beefmaster.

In the early 1930s, Tom Lasater, a Texas rancher, developed cattle that would grow, reproduce and become moneymakers even under the extremely difficult conditions in the rugged brush country of south Texas.

He crossbred Brahman, Hereford and Shorthorn cattle in a carefully controlled program.

Lasater wasn't interested in the color, horns, hide or other features that didn't influence the practical value of the animals. By 1937, he had succeeded and he closed the herd to breeding. The exact pedigree of the foundation cattle is not known because the breeding programs were carried out in multiple-sire herds.

Experts feel that Beefmasters carry slightly less than one-half Brahman blood and slightly more than one-fourth each of Hereford and Shorthorn breeding.

Joins Cooperator Ranks

In 1954, USDA recognized Beefmasters as a purebred. Seven years later, Beefmaster Breeders Universal (BBU) was established in San Antonio with 63 charter members.

In the two decades that followed, membership jumped more than 1,600 and the registry of cattle reached the 150,000 mark. The organization now has members from 25 states and Mexico and is a very active FAS market development cooperator.

Six satellite associations have been formed across the United States to hold consignment sales to expand promotion.

Demand and prices paid for Beefmasters rose steadily after the first sales in 1972. Eight sales were held that first year when 1,580 lots averaged $696. By 1981, 5,2691/2 lots sold in 60 sales for an average of $3,035.

Quality Control

The success of the Beefmaster breed and its association can be attributed to the ideas and work of many people. But two factors have played the biggest role:

- Progressive cattlemen have bred Beefmaster bulls to benefit commercial ranchers and help them make a profit; and

- Quality-control measures, incorporated by the breeders and stressed by BBU, have attracted confident new buyers.

The association's quality-control programs include voluntary classification, upgrading, BBU-approved sales and a weights and measures program. All of these programs are voluntary, and the breeders pay for the services they request.

Market expansion has been systematic and consistent with BBU's promotional efforts. During the past decade, the breed has spread across Texas, north to Kansas, and throughout the Southeast.

Florida is second only to Texas in numbers of breeders and cattle. California is second only to Texas in inquiries. Alabama follows Texas in the number of new non-member buyers. More recent expansion covers the Great Plains and western states, the upper south and eastern seaboard.

Contacts Help Expand Exports

Foreign markets are becoming increasingly important. Shipments to Mexico are growing more frequent and the volume greater, and BBU has sold and transferred embryos in Central America. Members have taken fact-finding trips to South America and to Australia to widen the scope of their marketing even further.

In late 1982, a group of 20 BBU officials and members visited an exposition in Monterrey, Mexico. There, they met with members of a newly organized association representing the Beefmaster breed in Mexico.

Earlier in the year, a group representing BBU traveled to Honduras where the first Beefmaster embryos were transplanted to native cattle for the

Brahmans— At Home on Any Range

first time. Fresh embryos were collected, transported and transferred in just 24 hours.

BBU representatives also met with officials from the Escuela Agricola Panamericana (EAP) located near Tegucigalpa, Honduras. EAP is a technical agricultural college with about 350 students from 19 Latin American nations. This private school is incorporating Beefmasters into its cattle program through the use of semen and bulls shipped from the United States.

BBU representatives also made a fact-finding tour of ranches in Venezuela. The group took another promotional tour during the summer that included other countries in South America.

Sales of Beefmasters to Colombia and Venezuela began in the 1970s. The sale of semen to these countries has increased in recent years, and this type of sale has expanded to include Argentina.

In Australia, BBU officials visited ranchers throughout the country to check climatic conditions, systems of management and breeding programs first hand. A reciprocal visit by Australian ranchers to the United States followed six weeks later. Already producing half-blood Beefmasters using semen, the Australians are looking at the possibility of importing purebreds.

Beefmasters and Beefmaster Breeders Universal have earned a place of respect in the purebred industry in the United States and now they hope to make a name for themselves all over the world. ■

The author is director of public relations of Beefmaster Breeders Universal, San Antonio, Texas. Tel. (512) 341-1277

By Cecilia Cowert

The Brahman is a highly developed survivor of its environment. Its methods may seem a bit ho-hum by comparison to others in the animal kingdom—for example, the camel that stores gallons of water, the bat's mysterious "radar" or the graceful cheetah that closes in on its prey at speeds of more than a mile a minute.

But among the bovine set, this sturdy native of India is a unique animal indeed.

When the temperature reaches above 70 Fahrenheit, most European cattle begin to lose their appetite and experience a decline in milk production. The Brahman, on the other hand, suffers little even at temperatures beyond 105 degrees. This is especially important for the American Brahman breed. In this country, many areas experience temperatures above 70 degrees every month.

Other factors contribute to the Brahman's ability to withstand higher temperatures. An abundance of loose skin is thought to help it dissipate heat by exposing more body surface to cooling. It also has an unusual ability to sweat through pores in the skin.

Top 1982 Brahman Markets—and Previous Sales
(Number of head)

Country	1977	1978	1979	1980	1981	1982
Mexico	27	46	129	258	839	334
Ecuador	8	1	25	—	4	141
South Africa	9	—	4	14	46	42
Dominican Rep.	—	3	33	21	72	40
Panama	45	44	31	171	86	36
Guatemala	176	134	143	16	20	31
Venezuela	431	117	7	1	43	30
Costa Rica	26	31	45	48	76	24
Philippines	6	14	64	1	—	16
Colombia	204	396	279	214	130	13

Most Brahmans are light in color which helps reflect much of the sun's intense rays.

The Brahman's eyelids are heavily laden with black pigmentation and protected from the sun by long eyelashes. As a result, Brahman cattle are virtually immune to most eye diseases. Unlike many cattle, they are also nearly immune to infectious pinkeye as well as other diseases.

Unique Qualities

Brahmans possess natural resistance to the various insect problems common to most cattle. Their light color does not attract insects to the extent that darker colors do. Also, their short, thick hair prevents many insects from reaching their skin.

Unlike European cattle, the Brahman has a well-developed layer of muscle that enables it to dislodge many insects by shaking the skin. The skin secretes an oily substance that effectively repels some insects.

Brahman cattle, on the average, produce offspring even at 15 years of age—about 50 percent longer than the producing age for European cattle. It is not uncommon to find purebred Brahmans up to 20 years old in regular production.

The Brahman, first brought into this country in the mid-1800s, boasts other qualities that make it popular among cattle producers.

In various studies in Texas, researchers found that Brahmans produced an average of 22 to 44 percent more milk than English beef breeds, depending on the lactation period. Experiments also show that there is little, if any, difference in the tenderness and flavor of beef produced by Brahman crossbreeds and European breed cattle.

New and Expanded Sales

The American Brahman Breeders Association, an FAS cooperator, has high expectations of increasing sales of the Brahman in Australia, Central America, South America, Mexico and Africa. These areas are known markets for this type of cattle.

Exports of U.S. Brahmans to South Africa increased more than three times, after a 1980 marketing trip, to more than 120 head. Zambia is another African market where sales are expected to be established in 1983 and increased in 1984. ■

The author is director of communications for the American Brahman Breeders Association, Houston, Texas. Tel.(713) 795-4444.

Opening New Markets For U.S. Angus

By Keith Evans

It was not so long ago that Scotland, the home of the Angus cattle breed, was the main source of breed improving stock. But now, a relative newcomer has gained this distinction.

In recent years, Angus cattle from the United States have become the standard by which Angus in most other countries are judged. This is due to major changes U.S. Angus breeders have made in the type and quality of their cattle since the late 1960s and their nearly universal use of performance records.

The major users of U.S. Angus cattle in the past decade have been Argentina and Brazil. A steady stream of U.S. Angus imports has drastically changed the type of Angus cattle bred in those two countries.

The winners of most of the major shows in recent years at Palermo near Buenos Aires, Argentina, and at Porto Alegre, Brazil, have been U.S. Angus bulls and females or cattle sired by U.S. Angus bulls.

One of the few U.S. agricultural products that is in demand in Argentina, Brazil and Uruguay is beef cattle seed stock. All three countries, with their large beef cattle populations and their need to improve production, have found that performance-tested Angus cattle provide them with the fastest and easiest way to achieve their goals.

Argentina has been the biggest importer of U.S. Angus cattle. In 1981, it bought 125 head, worth more than $1.5 million, plus some 4,400 units of frozen semen. The Falkland Islands crisis last year created major problems in selling U.S. Angus to Argentina.

Mexico, too, has provided a steady market for U.S. Angus seed stock. This trade has taken place on a far more informal basis, as Mexican cattlemen cross the border to personally select and buy bulls. The devaluation of the Mexican peso, however, has slowed purchases considerably the past year or so.

Efforts are underway to get U.S. Angus into the United Kingdom, Australia and New Zealand. Some progress is being made in both Australia and New Zealand. However, market development in those countries has long been held back by health regulations that many U.S. breeders feel are unnecessarily restrictive.

Some relaxation of the rules now allows the import of semen from U.S. bulls, provided the animal has been quarantined in Canada before the semen is shipped. Another factor that has helped the trade situation has been the opening of a cattle quarantine station by the Australian government.

Once foreign governments recognize the validity of accurate U.S. tests for blue tongue, as well as the existence of areas free of blue tongue in the United States, then the market should widen greatly. ■

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Country Briefs

European Community

Dairy Stocks Accumulate Again

After considerable success in selling off stocks of butter and skim milk powder in recent years, the European Community (EC) is again faced with growing surpluses. Increased world dairy production in 1982 and the slow growth in demand have forced the Community to increase subsidy levels for dairy products. Even so, its dairy stocks have grown. Recent reports indicate that butter stocks reached 335,000 metric tons in October 1982, considerably above 1981 levels. By May, 1982 stocks of skim milk powder had already surpassed 1981 levels.

As a consequence, the dairy sector again appears to be a growing nemesis to a balanced agricultural budget in the EC. Presently, the costs of holding stocks for a year are less than disposing of them through exports. However, this solution is a temporary one and, unless a substantial improvement in world dairy markets can be anticipated by 1984, is only a postponement of the problem.

A recent Commission proposal to sell subsidized butter to the Soviets was defeated because of political opposition in Germany and the United Kingdom. A reported unilateral French agreement with the USSR to sell butter as well as other agricultural commodities will require subsidies which the French hope to obtain from the EC. It is not clear whether such subsidies will be authorized.

Finland

More U.S. Cotton Imports Likely

Imports of U.S. cotton by Finland are expected to increase as much as 40 percent over the next few years to perhaps 4,750 metric tons. Two factors are favoring the increased use of U.S. cotton over that produced by the USSR—traditionally the No. 1 supplier. Technologies now permit shorter cotton to be used in some cases where medium length was necessary before. In addition, the Finnish textile industry is shifting towards production of higher quality garments that require more long-staple cotton. Soviet cotton exports tend to be the medium-staple category, whereas the United States can supply both short- and long-staple.

Hong Kong

Imports From China Displace U.S. Sales

Agricultural imports by Hong Kong totaled $3.7 billion in calendar 1982, up 5 percent from a year earlier. Purchases of $1.7 billion worth from China, represented almost 45 percent of the total import bill. China's share was only 37 percent just four years ago. Agricultural products, virtually all unprocessed, accounted for more than one-third of Chinese merchandise exports to Hong Kong. They were an important source of foreign exchange for the Chinese economy.

By contrast, the U.S. market share of agricultural products to Hong Kong declined from 20 to 16 percent during the same period, with the U.S. loss accounting for half the gain by China. The United States, however, is expected to remain the major supplier of wheat and cotton because of its large current exportable surpluses. The United States should also remain a big supplier of other items, such as frozen poultry and citrus, where quality is important.

Total U.S. agricultural exports to Hong Kong reached $402 million in fiscal 1982, only 4 percent above the 1981 level. However, the volume of U.S. cotton exports jumped sharply to 60,000 tons. Volumes also increased for poultry meat and wheat.

Middle East

U.S. Wheat Sales Could Increase

U.S. wheat sales to several Middle Eastern countries could pick up sharply this marketing year. Total import demand for the region is forecast to rise by around 1 million metric tons from a year ago to over 7 million. Furthermore, exports by the region's principal supplier, Australia, are expected to be cut substantially. The biggest potential for U.S. grains exists in Iraq, where total import demand is forecast to jump by 200,000 tons and where Australian exports could fall off by as much as 400,000 tons (assuming Australia lives up to its minimum export agreement with Iraq).

Portugal

U.S. Cotton Holds at 10-Percent Market Share

Despite an extended transportation period—it takes between 30 and 40 days for California raw cotton to reach Portugal—the United States continues to hold 10 to 12 percent of Portugal's cotton market. In fact, the United States is the country's third leading supplier, trailing only Israel (with a 26 percent share) and Turkey (20 percent).

While Mediterranean suppliers have an edge in the Portugese market because they can make quicker deliveries, the high quality of U.S. cotton continues to be a strong selling point. Portugal's raw cotton imports in the 1982/83 marketing year are expected to be up slightly as marketing prospects have improved for cotton-based Portugese textile exports, especially to non-European markets.

Sri Lanka

Rice Self-Sufficiency Seen This Decade

Because of improved yields and increased double cropping, Sri Lanka will likely become self-sufficient in rice within five to seven years, barring a sharp increase in per capita consumption or a change in current government policies. Two dams already completed under the country's Mahaveli Project have allowed double cropping on nearly 53,500 hectares. By the late 1980s, the scheduled completion of two more dams will boost rice production by 547,000 metric tons annually.

The Mahaveli Project is intended to provide needed irrigation water to the dry zone on the northern half of the island. The project was conceived when Sri Lanka consistently imported about 500,000 tons of rice annually. That deficit now has narrowed to about 150,000 tons. The government is faced with the prospect of either diverting some existing or new paddy land to other crops or exporting the surplus. However, to become a successful rice exporter, Sri Lanka may need to shift to varieties with better cooking and taste characteristics. The country also will need to improve its handling and milling of rice.

United Kingdom

Imported Grain Substitutes Cut Into U.S. Corn Sales

The United Kingdom's imports of grain substitutes have been rising sharply in recent years, totaling 2.3 million metric tons in 1981/82 The buildup of trade in manioc and corn gluten has been spectacular, and these items accounted for 35 and 24 percent, respectively, of all imports of the main grain substitutes in 1981/82. Other byproducts of grain processing—rice brans, milling offals and grain screenings—accounted for nearly one-third of the total.

Corn, an imported feed grain and an important U.S. export to the United Kingdom, has diminished significantly in importance in recent years. Feed use of corn amounted to only 714,000 tons in 1981/82, compared with an average of 1.6 million tons in the 1977-81 marketing years. The decline largely reflects increased use of grain substitutes and domestic wheat by U.K. feed compounders. Also, sterling has been undervalued relative to currencies in grain supplying countries, and thus the relative import prices of grain increased.

Yugoslavia

Credit Arrangements To Spur Purchases of U.S. Soybean

U.S. exporters are expected to capture a large share of Yugoslavia's expanded imports of soybeans, meal and oil in the 1982/83 marketing period (Oct.-Sept.). Despite the near doubling of Yugoslavia's soybean crop last year, domestic oilseed production still provides only about a third of the country's needs. Approximately 200,000 metric tons of vegetable oil in the form of crude oil or oilseeds for crushing will be required. Most of the beans, oil and meal are expected to be imported from the United States under credit arrangements.

Electro-Fishing for Eels Nets New U.S. Markets

By Edmund Paige and Michele Schachere

Ancestors of Vermont's Abenaki Indians would be shocked if they fished for eels with their present-day descendants on Lake Champlain. Today, the Indians fish for eels electrically.

Instead of canoes and spears, motor boats and high technology aid in the fishing. The traditional methods (nets, traps or angling) have given way to modern science that helps speed up trapping and increase the catch.

Electro-fishing on Lake Champlain began in 1980 when the University of Vermont issued a report that the lake was populated by millions of eels. No one stood up and cheered. Americans detest eels, liking neither their looks nor their taste.

Game fishermen feel the same way for different reasons. They regard eels as a nuisance and either destroy them or throw them back in disgust.

Europeans, however, regard eels as a high-protein delicacy and pay high prices for them. In recent years, the reputation of American eels has suffered as a result of pollution problems.

Lake Champlain, however, is cool, clean and unpolluted. Eels from the lake can be sold at top prices in Europe. Eels sell for about $14 a pound in Europe and cost only about $2 a pound to ship.

All things considered, even from the start, there were some people who felt that it would be worthwhile going after the eels. Among these was a University of Vermont faculty member, R. Montgomery Fischer. He formed a partnership which eventually became a cooperative that included the Abenaki Indians. Equipment was assembled and commercial eel fishing began, despite some protests and interruptions by those who believed the lake should be reserved exclusively for recreational use.

Fischer, who led the cooperative, set out to learn all he could about the export business. He read books, brochures and magazines on the subject. He also attended seminars, including one given by EUSAFEC (the regional state organization representing the New England States that cooperate with the Foreign Agricultural Service). He also made contact with the trade, both domestic and foreign.

His efforts paid off handsomely. By the autumn of 1982 he successfully negotiated a contract with a European buyer to sell the entire catch for 1983—regardless of its volume—at very favorable prices.

He had succeeded in establishing an industry harvesting something that nobody liked in Vermont, but everyone liked in Europe.

Method Is Efficient—And Safe

Electro-fishing is relatively efficient, very selective, does not harm the environment, is clean, allows fishermen freedom to move about and leaves gamefish unharmed. The equipment involves a small two-person boat, arc flood lights, a heavy duty battery, hand nets and an on-board tank of water to keep the "catch" alive.

It is night. The quarry is spotted. Suddenly a burst of electricity is shot through the water, temporarily immobilizing the eels. The electronic charge is activated by the fisherman's foot; should he accidentally fall into the water, the circuit is automatically broken, preventing electrocution. The eel is then scooped up by a hand net and placed in the fresh water on-board tank.

Of course the system is not foolproof. A smart eel can simply swim away from the approaching boat. Eels can also elect to stay home at night in the mud, rendering the whole evening's operation useless. It is also an expensive operation.

Luck Is Needed, Too

As in all fishing operations, luck also plays a part. Additionally, if a gamefish is seen in the vicinity, any eel observed must be forfeited as it is illegal to take gamefish in this manner.

Climate is also a factor. During the summer months, eels pull back into the deeper, cooler waters and cannot be reached. During the winter (winter comes early and stays late on Lake Champlain), the water is frozen and eel fishing ceases.

Equipment is costly. Electrical gear must be sturdy, water resistant and provide ample safety features.

This is Yankee ingenuity at its best: adding value to nuisance, increasing export sales, creating work for Abenaki Indians and bringing some extra happiness to both sides of the ocean. ■

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Eels and the Bermuda Triangle

Legend has it that elephants go to die in a mysterious, jungle graveyard. This may be true and it may not. But in the case of eels, it is a scientific fact. All North American and European eels go off to a faraway place in the ocean and simply "disappear."

The eels are all born in the same place, the Sargasso Sea, a mysterious body of water, south of Bermuda, between the West Indies and Azores—part of the Bermuda Triangle. The sea is covered by floating seaweed and is relatively still above restless currents.

It is here that the eels spawn and fertilize millions of eggs 1,000 feet below the surface. The young eel larvae hatch in the spring and are then drawn into the Gulf Stream and start to drift northward.

They arrive at the East Coast of America sometime during the following winter. At this stage, the "elvers" are transparent, with ribbon-like bodies and tiny heads. Gradually, they begin to resemble adult eels. Upon arrival in shallow water the sexes separate. Females migrate up the rivers leaving the males in the salt water estuaries. The females grow larger than the males, often reaching four pounds or more.

Males and females remain in their respective places from two to as many as 20 years until their biological "clocks" tell them it is time to go back to their birthplace to start another cycle.

At this point the female consumes relatively large quantities of food, changes to a silvery color, her eyes enlarge, and her trek back begins.

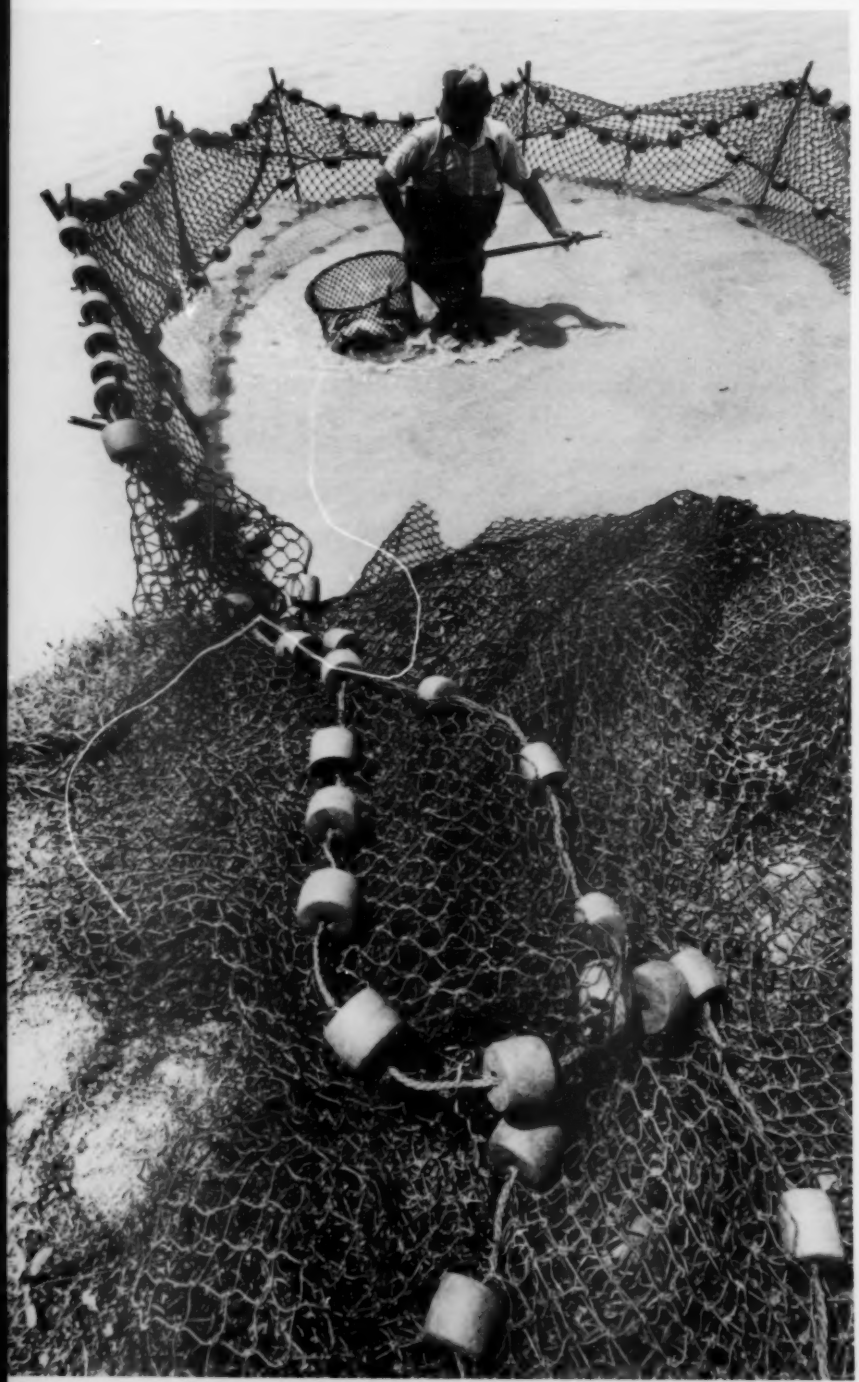
The male, operating with his individual biological clock, also heads back for the same area.

When they finally arrive at their birthplace, males link up with females and perform what is destined to be their last act — that of reproduction. When the eggs are spawned and the process is completed, the adults die and simply disappear.

Scientists have captured eels long before they arrive, and have implanted radio devices for tracking purposes. Signals are emitted and the progress of the eel from inland waterway to the Sargasso Sea has been monitored. Upon arrival, however, the signals cease and nothing is heard from them again.

No bodies are ever recovered. The eels simply appear to vanish from the face of the earth.

U.S. Catfish Pass Taste Test in Europe



By Robert Wicks

European fish traders who have sampled U.S. catfish think it's "smacking good." And that is raising hopes that Europe may turn into a sizable market for U.S. catfish in coming years.

"Tasting was the first step in overcoming European resistance to the idea of serving catfish as a main dish," relates Henry J. Williams of the American Catfish Marketing Association.

Williams was the leader of a marketing team that visited cities in the United Kingdom, Sweden, France and Italy in 1982. The trip was co-sponsored by the Foreign Agricultural Service (FAS).

"Buyers who tried our fish were very enthusiastic about it. The farm-raised U.S. product is unlike the saltwater catfish or bullheads being marketed in Europe," Williams says.

Only in recent years has the attention of U.S. catfish producers begun to turn to foreign markets as outlets for some of their excess production. U.S. catfish production, which exceeds 100 million pounds, is more than enough to meet the needs of the domestic market.

Cracking the European market won't be easy as Williams points out. "There are, of course, problems connected with exporting catfish to European markets. Most catfish are sold alive in Europe and we want to supply the market with frozen, packaged fillets.

"Despite this obstacle, we have already received orders from the United Kingdom and France and are optimistic about sales possibilities in these countries and in the others we visited.

"I believe the next few years will see Europe become a new market for farm-raised catfish."

As a result of the efforts of the marketing team led by Williams, U.S. catfish was featured at the first FAS-sponsored food exhibit for small and

minority export firms. The two-day show was held in London.

Later in the year, representatives of the U.S. catfish industry participated in the 1982 IKOFA Show in Munich, Germany, in September and in the Paris SIAL show in November.

European hoteliers and caterers were impressed with the high quality of U.S. catfish and the fact that it is available 365 days a year. Most fish on restaurant menus in Europe are very seasonal.

Featured at the Paris show were numerous recipes for catfish using primarily the methods of preparation with sauces, etc. preferred by European palates. ■

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Quarter Horses Capture Spirit of America and the World

By Cam Foremen

He is a superbly trained athlete. He is housed and cared for, travels across the country on land and in aircraft. People write books and speeches and make films about him. They spend their fortunes advertising his talents. He is the American quarter horse.

The American Quarter Horse Association (AQHA), formed 43 years ago in Fort Worth, Texas, and now located in Amarillo, has registered nearly 2 million horses in the United States and in 67 other countries.

AQHA is the world's largest equine registry, supported by more than 130,000 dues-paying members and an additional 600,000 quarter horse owners.

In 1982, AQHA registered more than 150,000 horses and transferred about 250,000. The year before it had registered 148,785 horses and transferred 235,065 to new owners.

The association's International Department is continually developing new and expanding markets for American quarter horses. To aid this rapidly growing market, the department promotes the export of breeding and riding mounts to Australia, West Germany, Italy, France and England as well as to South and Central America, New Zealand, Canada and Mexico.

Foreign Associations

The department has been instrumental in getting quarter horse associations formed in many countries. These include Argentina, Australia, Brazil, England and Italy as well as Mexico, New Zealand, Paraguay, Uruguay and West Germany. These groups, in turn, help promote quarter horses in their countries.

There are more shows held annually for quarter horses than there are for all other breeds of horses combined. For example, enthusiasts held 2,190 AQHA-approved shows—open to all exhibitors—throughout the United States, Canada, Mexico and England in 1981.

A Hard Worker

The World Championship Quarter Horse Show, held in November, highlights the show season. The invitational show features less than one-tenth of 1 percent of the American quarter horse population competing for hundreds of thousands of dollars in prize money.

Over the years, horses from Canada, Mexico, Australia, England and Italy, in addition to those from the United States, have qualified for this prestigious show.

Another boom in the industry is quarter horse racing. The purse for the 1982 All-American Derby on Labor Day

at Ruidoso Downs in New Mexico totaled about $2.35 million.

It's only proper that the quarter horse should be honored on Labor Day since quarter-horse enthusiasts say he can work harder and better at more jobs than any other horse. For more than 300 years, he has been the all-American, all-purpose horse.

What's more, only quarter horses have won the contest staged annually by the National Cutting Horse Association to determine the world champion cutting horse. This contest is open to horses of all breeds, but the inherent "cow sense" of the quarter horse dominates the organized cutting events. In the contest, horse and rider separate steers from the rest of the herd.

There are, of course, uncounted thousands of quarter-horse enthusiasts who neither race nor participate in competitive events. They prefer to ride quarter horses simply for exercise and fun.

Services Offered by AQHA

The AQHA employs more than 240 people. The association's computer terminals can display in a matter of seconds the breeding, ownership, performance and racing records on any of the registered quarter horses.

In addition, the association publishes a breed magazine and an annual handbook containing association bylaws, the rules and regulations of registration, halter and performance events and racing. It also publishes a monthly racing chart book.

A variety of booklets illustrating various aspects of horses and horsemanship are published by the AQHA and available free by writing to: American Quarter Horse Association, P.O. Box 200, Amarillo, TX 79168.

Motion pictures are also available in the library. These films are free to use and some are available in foreign languages.

The continued growth of this breed registry is indicative of the distance the quarter horse has come since 1940. ■

The author is director of special events of the American Quarter Horse Association, Amarillo, Texas. Tel. (806) 376-4811.)

Trade Updates

Argentina Considering Export Credit Program

Record wheat output, currently projected at 12 million tons, will present Argentina with a major export challenge this season, particularly given record wheat supplies in Canada, the EC, and the U.S. To date, sales have been made to the USSR, Iran, Saudi Arabia, and China, but activity still lags considerably behind seasonal levels. Argentina has kept only minimal stock levels in the past and surplus wheat is expected to move into export.

Argentine wheat exports during December 1982-November 1983 could climb to about 8 million tons, more than double 1981/82 exports of 3.6 million tons. The Argentines appear concerned about achieving this export level and reports indicate that some type of export credit program is under consideration. Peso devaluations have made Argentine wheat prices competitive, but Argentina is having difficulty competing against French, Canadian, and U.S. credit programs in some markets.

Brazil Sells Sugar to USSR

Brazil's Sugar and Alcohol Insitute (IAA) announced in mid-December a new export sales contract with the Soviet Union for 500,000 metric tons of sugar for delivery during January-July 1983. The contract—signed between IAA and Soviet officials—also gives the USSR the option to purchase an additional 250,000 tons for shipment in July and August 1983. Should the USSR make these additional purchases, total Brazilian sugar sales to the USSR in 1983 would represent more than 25 percent of Brazil's total exports.

France Sets Grain Pacts With Four Countries

Currently France has grain agreements with China, Egypt, Morocco and the Soviet Union. The arrangement with China is a noncompulsory, three-year agreement for 500,000 to 700,000 metric tons of wheat. Beginning last year, France also offered China a two-year, 12-percent loan for 700,000 tons of wheat under a 875,000-ton sale.

France also has extended 1.5 billion francs to Egypt in 1982/83 for the purchase of agricultural commodities, including wheat and wheat flour. The terms of the loan are 11 percent interest, 0.6 percent insurance and a 20-percent cash deposit. For Morocco, France extended one-year credit for 800,000 tons of wheat on the same terms given to Egypt.

France and the Soviet Union reportedly have agreed on sales of up to 3.0 million tons of French grain annually for three years. These sales will be carried out within the framework of a three-year agreement of intent signed last October in Moscow. The pact is designed to increase trade of agricultural commodities between the two countries. All French grain exports are eligible for European Community export restitutions—which averaged around $75 per ton for wheat in late 1982.

California's Kiwi Markets in Europe Threatened by France

France appears to be on the verge of becoming a significant exporter of kiwi fruit as a result of rapid expansion in domestic output. Although commercial production began only as recently as 1976, crop outturn in 1981 reached 1,700 metric tons and an estimated 3,000-3,500 tons in 1982. Production is projected to hit 10,000 tons by 1985 and 15,000 by 1990.

Nearly all of France's production is exported. Principal export markets are West Germany, Scandinavia, Belgium, the United Kingdom and the Netherlands. Efforts to promote kiwi fruit in France will improve consumer awareness of what is still a relatively unknown fruit. Despite the need to satisfy a growing domestic demand, France's export availability will rise sharply in the near future and could threaten the export markets developed by California exporters in Western Europe.

Israel Curtails Certain Agricultural Exports to Lebanon

Following the 1982 war in Lebanon, there was an increase in fresh fruit and vegetable products that Israel sent to the Lebanese. Now, Israel is prohibiting exports of certain agricultural products in order not to disturb Lebanese agricultural production and markets. Among the prohibited items are oranges, apples, potatoes, olive oil, milk, poultry, eggs and bread. While foodstuffs have been the main issue, Israeli exports of industrial items, such as textiles and plastics, have also increased.

Spain To Export Wheat to USSR And Flour to Egypt

The Spanish government has authorized the export of 350,000 metric tons of wheat to the Soviet Union for approximately $128 a ton with a six-month grace period for payment, according to press reports. This tonnage is part of a surplus estimated by the government at 600,000 tons. An additional 150,000 tons will be used for producing semolina and flour mostly for export to Egypt. The remaining 100,000 of surplus wheat will be sold for use in domestic mixed feed.

Livestock producer organizations have protested the proposed exports, claiming that it would be more profitable to sell the wheat to them so they could avoid importing feed grains. The government has defended the exports, stressing the need for a balance of trade with the USSR and the possibility of exporting other surplus products, such as wine and olive oil, to the Soviet Union.

Spanish Vegetable Oil Sold to Soviets

Spain sold 20,000 metric tons of crude soybean oil to the Soviet Union for January delivery, and press reports indicate further sales of about 20,000 tons of olive oil could take place. Spanish soy oil exports to the Soviet Union in 1982 were estimated at some 68,000 tons, compared with 28,000 tons a year earlier.

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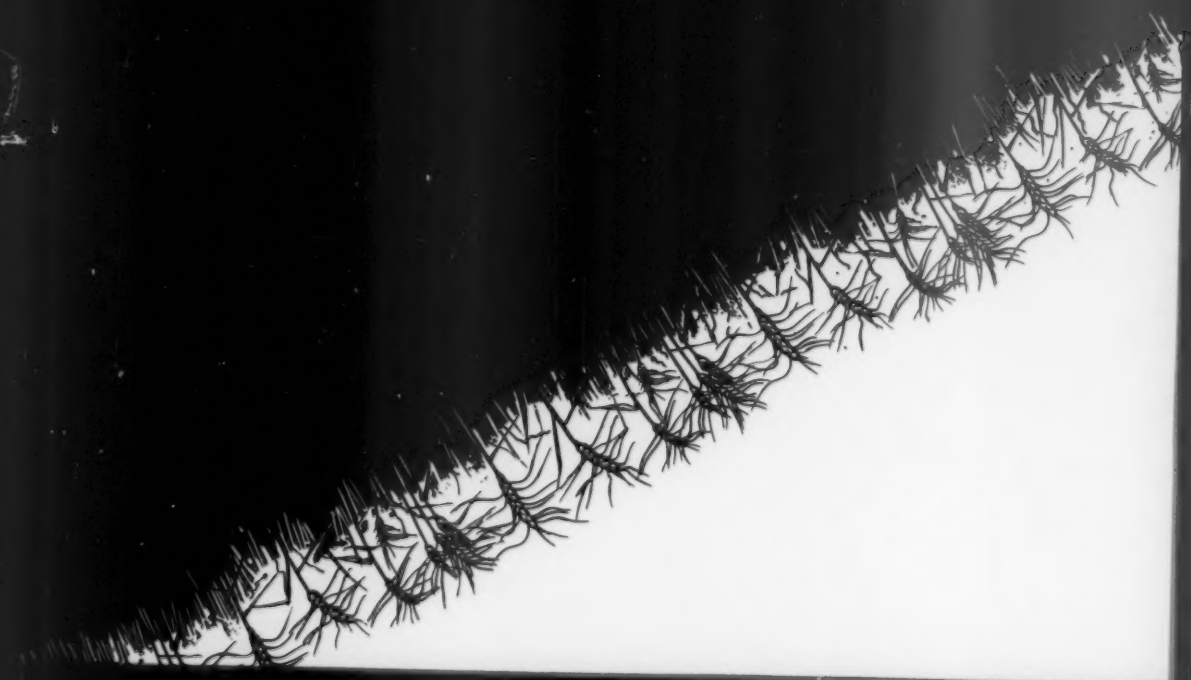
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